**Sample: Customer Service Knowledge Management**

**Requirements Template**

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| **Requirement** | **\_\_\_\_\_\_\_\_\_** |
| Central point to find knowledge/answers |  |
| Fast reliable search with:* Predictive suggestions
* ‘Did you mean?’ suggestions
* Ranking
* Key words
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| Process guidance with* Drop-down to see all steps in the process (to skip irrelevant steps)
* Flow chart view
* Navigation function
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| Easy way to announce product, process and policy changes without taking staff off the phones (eliminating emails). Must be possible to * Centrally control where it is filed
* When it is referred to,
* Be fully reportable and time sensitive, e.g. expire when the information is in the past so a person starting a shift after the event does not see it.
* Send notification to Agents when in another system there is an urgent announcement to be read
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| Easy way to keep knowledge current and relevant to optimise utilisation ie.* Feedback
* Ratings
* Pre-set review dates
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| Ability to deliver answers through multi-channels i.e. * Intranet
* Corporate Website
* Chat
* Virtual assistant etc
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| ‘Favourites’ feature so Agents can get easy access to regularly used knowledge |  |
| Format which delivers answers to questions not long PDF/Word documents |  |
| Ability to simplify the most complex customer enquiry down to a few standard questions (decision matrix) but still ensure the correct answer every time |  |
| A quiz function to check Agent’s understanding of knowledge |  |
| Continuous improvement mechanism that allows staff/users to quickly provide process improvement suggestions within seconds |  |
| Workflow Management – allowing the organisation to decide who has authority to Author, Edit, Review, Publish etc.  |  |
| Permissions feature so the organisation can manage who is allowed to see what knowledge within your system |  |
| Customer journey sensitive with:* Related links to regularly asked secondary questions
* Can embed video, google maps and any other customer preferred communication channel
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| Managed by the business – not IT  |  |
| Easy to access 24/7 service and help desk |  |
| Easy to follow, easily searchable help site |  |
| No IT project or build cost |  |
| Up and running in weeks - Obtain efficiencies in weeks |  |
| Tablet Compatible |  |
| Enhancements and new features as technology evolves – at no cost |  |
| Cloud for remote access and disaster recovery |  |
| Ability to protect data sovereignty (Australia) |  |
| Single sign-on functionality |  |
| Knowledge is standalone – APIs to serve knowledge/answers through any system – i.e. CRM, Telephony, Ticketing, Virtual Assistant/Chat-bot |  |
| Easy to access reports and analytics regarding:* Most Popular search term/questions
* Zero search result
* Who is accessing What information
* Least accessed knowledge
* Announcement Read Report
* Feedback
* Knowledge usage
* Quiz
* Login
* Agent action history
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